

INSTRUCTIONS
2005 PVEA WEATHERIZATION BIMONTHLY EXPENDITURE/ACTIVITY REPORT
CSD 691 (New 07/05)

HEADING

Enter the name of your agency, contract number, report period, and check "Adjustment", if applicable. Enter the name of the person preparing the report, e-mail address, direct telephone number, and fax number.

REPORT ADJUSTMENT

Enter the report period to be adjusted and check (✓) the box in the Report Adjustment block. Enter the amounts to be adjusted only. Use plus (+) or minus (-) to the left of the amount being adjusted. Do not include data already reported to CSD.

REIMBURSEMENT CRITERIA FOR MEASURE INSTALLATION

When labor, materials, square footage, and linear footage measures are being charged, you must enter the amount in the corresponding rows/columns to obtain credit for the measure/costs. Do not leave the dwelling and the unit of measure or the labor and materials columns blank if the measure was installed.

When calculating labor costs, use only actual labor hours incurred for the installation of measures by crew members. Labor costs associated with supervisors, support staff, and down time are included in the approved labor rate. Travel time shall not be charged under any measure line item and is included in the travel reimbursement fees (Section 200) and incorporated into the approved labor rate.

In order to make a determination on whether a heating or cooling appliance can be repaired or replaced, a diagnosis of the appliance must be made by a qualified technician.

REIMBURSEMENT CRITERIA FOR MEASURE INSTALLATION BY SUBCONTRACTORS

If a Subcontractor was used to install any measure with a maximum reimbursement, enter the total cost for labor and materials charged by the Subcontractor in the Subcontractor column. All fixed fee measures will be reimbursed at the fixed rate for all subcontracted work. Appliance disposal and permits provided by a Subcontractor should be included in the Subcontractor column for the measure associated with such fees. Do not include costs for appliance disposal and permits provided by a Subcontractor under Section 195. Fees associated with HERS rater activities are to be charged as a Subcontractor cost, under Section 195.

Note: HERS activities are Subcontractor activities, however due to the mid-year implementation of HERS regulations, Contractors are to utilize Section 195, line item #107, "Labor- Crew" column for reporting HERS activities. The EARS reporting system will recognize HERS reporting as a Subcontractor cost. Contractor must be able to substantiate all labor hours and labor costs charged.

Additional materials and crew members' labor that share in the installation of a measure when a Subcontractor is used can be charged. Use the actual labor hours of crew members at the approved labor rate. Enter these costs under the Labor and Materials columns and do not include in the Subcontractor column.

If labor costs associated with support staff are incurred when using a Subcontractor and there are no billable crew member hours for the measure, actual labor hours for support staff time are reimbursable. A modified fixed labor rate determined by the Contractor or actual labor costs shall be used. A modified fixed labor rate that is to be used must be submitted to CSD for approval before requesting reimbursement for these costs. Enter the labor costs under the “Other Labor” column and do not include in the Subcontractor column or the Labor column for basic crew members.

REIMBURSEMENT CRITERIA FOR DISPOSAL FEES, PERMITS BY AGENCY STAFF, AND HERS RATER ACTIVITIES

Contractor shall bill under Section 195 the actual labor hours incurred by weatherization crew members or other personnel associated with the direct facilitation of the disposal of appliances, the procurement of permits, and services provided by a HERS rater. Labor hours for other personnel are billable only if there are no billable hours for weatherization crew members for these services. The approved labor rate will be allowable for weatherization crew members only. For other personnel, a preapproved modified fixed labor rate determined by the Contractor or actual labor costs shall be used.

NOTE: *Contractor must be able to substantiate all labor hours and labor costs charged.*

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SECTION 10 – ADMINISTRATIVE COSTS

Line 1 – Administrative Costs - Enter the actual expenditures incurred for Administration. Include salaries, wages, workers compensation, and fringe benefits for administrative staff, accounting, audit, intake (that exceeds the allowable 2% under Program Costs), equipment, facilities, office supplies, telephone, travel, utilities, and miscellaneous. Enter the actual expenditures for Intake that were charged under this section in the space provided under Section 35, Line 11 (for informational purposes only).

SECTION 20 – OTHER PROGRAM COSTS

Line 2 – Liability Insurance - Enter the actual expenditures incurred for Liability Insurance. Include insurance bonds, general liability, vehicle insurance, and pollution occurrence insurance (if applicable).

Line 3 – Vehicle and Equipment - Enter the actual expenditures incurred for Vehicle and Equipment over \$5,000 per unit. Purchases under \$5,000 are included in the approved labor rate with the exception of Duct Blaster purchases. For 2005 only, Duct Blasters may be charged to this line item. Enter the actual expenditures incurred for the purchase of Duct Blasters that were charged under this line item in the space provided under Section 35, Line 12 (for informational purposes only).

Line 4 – Total Other Program Costs - Enter the sum of Lines 2 through 3.

SECTION 30 – PROGRAM COSTS

Line 5 – Intake - Enter the actual expenditures incurred for Intake. Intake is defined as the act of determining if a person seeking LIHEAP assistance is eligible for such services. Includes, but is not limited to, the process of completing an intake form and reviewing applicant’s documentation in order to verify eligibility.

Line 6 – Direct Program Activities - Transfer the total amount from Section 210, Line 114.

Line 7 – Outreach - Enter the actual expenditures incurred for Outreach.

Line 8 – Workers’ Compensation - Enter the actual expenditures incurred for Workers’ Compensation. Do not include expenditures associated with those salaries charged under administration.

Line 9 – Total Program Costs - Enter the sum of Lines 6 through 8.

SECTION 33 – TOTAL COST BEFORE REPAYMENT

Line 10 – Total Cost Before Repayment - Enter the sum of Section 10, 20, and 30, for the reporting period.

SECTION 35 – FOR INFORMATIONAL USE ONLY

Line 11 – Intake – Enter the actual additional Intake costs that were included in Administrative Costs (Section 10, Line 1) for the period.

Line 12 – Duct Blasters - If Duct Blasters are purchased through the PVEA Weatherization contract, enter the actual costs of the Duct Blasters that were included in Vehicle and Equipment (Section 20, Line 4) for the period.

SECTION 38 – ADVANCE REPAYMENT

Line 13 – Advance Repayment – Enter the amount to be applied toward any weatherization outstanding advance balance.

SECTION 40 – TOTAL COSTS

Line 14 – Total Costs - Subtract Section 38, Line 14, from Section 33, Line 11. This total represents the total reimbursement for the reporting period.

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SECTION 60 – TYPES OF DWELLINGS WEATHERIZED

Lines 1 through 8 – Types of Dwellings Weatherized - Enter the number of Dwellings Weatherized by dwelling type. Count each dwelling once.

Line 9 – Unoccupied Dwellings – Enter the number of unoccupied dwellings weatherized.

Lines 10 – Total Units Weatherized - Enter the sum of Lines 1 through 9. This total (less Unoccupied Dwellings) should equal the totals in Sections 70 and 80. The total (including Unoccupied Dwellings) should equal the total in Section 90.

SECTION 70 – NUMBER OF HOUSEHOLDS ASSISTED WITH GROSS MONTHLY INCOMES

Lines 11 through 15 - Gross Monthly Income Ranges - Enter the number of Households Assisted in the appropriate range. Count each household once.

Line 16 – Total Households with Gross Monthly Incomes - Enter the sum of Lines 11 through 15. This total should equal the totals in Sections 60 (less Unoccupied Dwellings) and 80.

SECTION 80 – NUMBER OF HOUSEHOLDS ASSISTED BY ENERGY BURDENS

Line 17 through 22 –Energy Burden Ranges - Enter the number of Households Assisted in the appropriate range. Count each household once.

Line 23 – Total Households by Energy Burden - Enter the sum of Lines 17 through 22. This total should equal the totals in Sections 60 (less Unoccupied Dwellings) and 70.

SECTION 90 – PROGRAM LEVERAGING

Lines 24 through 25 – Leveraged Units - Enter the total number of LIHEAP only units on Line 24 including those completed units that were leveraged with non-CSD programming funds. Enter those completed units that were leveraged between both LIHEAP and DOE on Line 25.

Line 26 – Total Units Leveraged - Enter the sum of Lines 24 and 25. This total should equal the totals in Sections 60 (including the Unoccupied Dwellings).

SECTION 100 – NUMBER OF HOUSEHOLDS ASSISTED WITH AT LEAST ONE MEMBER WHO IS:

Lines 27 through 31 – Number of Households Assisted with at Least One Member In a Vulnerable Population Category - Enter the number of households who fall within the listed vulnerable population categories. A household may be counted in more than one category. The number in Line 29 is not a total of Lines 30 and 31.

SECTION 110 – NUMBER OF HOUSEHOLDS WITH VULNERABLE POPULATION

Line 32 – Number of Dwellings Weatherized with at Least One Vulnerable Population Client per Household - Enter the number of households with at least one vulnerable population client.

SECTION 115 – PERCENT OF HOUSEHOLDS WEATHERIZED WITH VULNERABLE POPULATION

Line 33 – Percent of Households Weatherized with Vulnerable Population - Divide Section 110, Line 32 by Section 60, Line 10, and enter the result.

SECTION 120 – AVERAGE HOUSEHOLD ENERGY BURDEN

Line 34 – Average Household Energy Burden – From the Intake applications, calculate the average energy burden percentage (%) of weatherization households assisted within the reporting period.

SECTION 130 – OTHER UNIT TYPES

Line 35 – Number of All Electric Units - Enter only those completed units that have no gas appliances.

Line 36 – Number of Units With Gas Appliances Not Requiring CAS Testing – Enter only those completed units that did not receive CAS testing but have gas appliances of any type in the unit.

Line 37 – Number of Units with FAUs - Enter only those completed units that have operable FAUs.

Line 38 – Total Reweatherized Units - Enter only those completed units that were previously weatherized with any CSD Weatherization Program funds.

Line 39 – Units Receiving Assessments and/or Diagnostic Tests But No Other Weatherization Services – Enter the number of units that received assessments and/or diagnostic tests but did not receive any weatherization services due to the inaccessibility of the dwelling and/or the nonfeasibility of all measures.

SECTION 140 – LEAD-SAFE WEATHERIZED UNITS

Line 40 – Units Built Before 1979 - Enter the number of units built before 1979 including HUD units.

SECTION 150 – HOUSING AND URBAN DEVELOPMENT UNITS

Lines 41 through 43 – HUD Units - Enter the number of HUD units weatherized, HUD units built before 1979, and HUD units requiring certified lead-safe inspections. The total HUD units built before 1979 should also be included in Section 140, Line 40.

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SECTION 160 – ASSESSMENTS AND DIAGNOSTICS

Lines 1 through 9 – Assessments and Diagnostics - Enter the number of dwellings in the applicable activity. Each unit shall receive a unit assessment and, if applicable, a CAS test and either a blower door or Duct Blaster test. If a Duct Blaster is used for determination of duct leakage in a unit, the blower door test cannot also be charged. Multiply the number of dwellings times the rate and enter the sum in the Report Period Expenditure column.

Note: When furnace repairs or replacements are being provided through ECIP HCS in conjunction with LIHEAP or DOE weatherization, the assessment and CAS testing for the unit shall be charged to weatherization and not ECIP HCS.

Line 10 - Contractor Post Weatherization Inspection - Enter the number of dwellings that received a post inspection during this period. Reimbursement is based on the actual labor hours of the inspection activity at the approved labor rate, up to a maximum of three hours per dwelling. Multiply the number of actual labor hours including travel time multiplied by the approved labor rate and enter the sum in the Report Period Expenditure column.

Note: Contractor shall perform Post-Weatherization Inspections on twenty-five percent (25%) of the total weatherized dwellings per reporting period. Inspections performed above the 25% requirement are not reimbursable; however, if due to rounding, the number of required inspections does not equal twenty-five percent (25%), the number of required inspections performed shall be rounded up and the maximum reimbursement limit will be increased accordingly.

Line 11 – Total Assessments - Enter the sum of Lines 1 through 10.

SECTION 165 – MANDATORY HEALTH + SAFETY MEASURES

Lines 12 through 34 – Mandatory Health + Safety Measures - Measures are required when safety hazards exist due to combustion appliances being used in the home. Enter the number of dwellings that received these measures. Calculate the cost by using actual labor hours of crew members only and materials used and/or subcontractor fees and entering the sum in Report Period Expenditure column. If crew members were required to perform some work in conjunction with the Subcontractor, labor calculated on the actual labor hours for crew members only and materials should be entered under labor and materials. Labor costs in association with supervision and support staff are included in the approved labor rate.

Note: When a Vented Heating Source Replacement is performed, in addition to all assessments and other installed weatherization measures, the total maximum investment per dwelling can be increased to \$4,234.

Carbon Monoxide Alarm is not a carbon monoxide-producing device. It is required when the home operates carbon monoxide producing appliances. If client refuses the installation of a carbon monoxide detector, document the refusal in the client's intake application and have the client initial/sign.

Line 35 – Total Mandatory Health + Safety Measures - Enter the sum of Lines 12 through 34.

SECTION 170 - MANDATORY INSULATION MEASURES

Lines 36 through 43 – Mandatory Insulation Measures - Enter the number of homes that received ceiling, duct, and kneewall insulation under the applicable line item. Calculate the cost by multiplying the square footage times the rate and enter the sum in the Report Period Expenditure column.

Line 44 – Total Mandatory Insulation Measures - Enter the sum of Lines 36 through 43.

SECTIONS 175 THROUGH 190 – MANDATORY INFILTRATION REDUCTION, MANDATORY GENERAL HEAT WASTE MEASURES, MANDATORY EBL, AND OPTIONAL MEASURES

Lines 45 through 103 – Mandatory and Optional Measures - Enter the number of dwellings and the unit of measure as applicable. Calculate the cost by using actual labor hours of crew members only and materials used, by multiplying the unit of measure times the fixed rate (where applicable) and/or subcontractor fees. Enter the sum in the Report Period Expenditure column.

Note: If costs for an installed measure are greater than the allowed maximum, minor envelope repair cannot be used to offset the additional costs. Written authorization to exceed a maximum must be obtained from the Contractor's Field Representative, and the additional costs must be charged to the appropriate measure. The only exceptions are Window Replacement that has a maximum average and emergency after-hours heating and cooling services.

Lines 57, 64, 71, and 104 – Section Totals - Enter the sum of Lines 45 through 56 in Line 57, Lines 58 through 63 in Line 64, Lines 65 through 70 in Line 71 and Lines 72 through 103 in Line 104.

SECTION 195 - OTHER WEATHERIZATION COSTS

Lines 105 through 106 – Disposal Fees and Permits - Enter the number of dwellings, number of fees, total fees paid and labor costs. Refer to the Reimbursement Criteria for Disposal Fees and Permits at the beginning of these instructions. Appliance disposal and permits provided by a Subcontractor should be included in the Subcontractor column for the measure associated with such fees. Do not include the

Subcontractor's costs for these items in this section. Enter the sum in the Report Period Expenditure column.

Line 107 – HERS rater - Enter the number of dwellings, total labor hours, total fees paid, and total Subcontractor costs (under Labor-Crew) column. Refer to the Reimbursement Criteria for Measure Installation by Subcontractors at the beginning of these instructions. Enter the sum in the Report Period Expenditure column.

Line 108 – Lead-Safe Weatherization Materials - Enter the number of dwellings that received lead-safe weatherization for the period. Crew members' labor hours associated with lead-safe weatherization shall be included in minor envelope repair or the measure associated with the performance of lead-safe weatherization. Enter the total materials in the Report Period Expenditure column.

Line 109 – Total Other Weatherization Costs – Enter the sum of Lines 105 through 108.

SECTION 200 – TRAVEL

Line 110 - Single Family Dwelling - Enter the number of single-family dwellings (1 to 4 units) and multiply by the approved labor rate. Enter the sum in the Report Period Expenditure column.

Line 111 – Multi-Family Dwelling - Enter the number of multi-family dwellings (five or more units), multiply by \$3.00, and enter the sum in the Report Period Expenditure column.

Line 112 – Mileage Outside of 60-Mile Round Trip - Enter the number of dwellings where the round-trip travel exceeds 60 miles. Enter the miles that exceed the 60-mile limit and multiply by \$0.66. Enter the sum in the Report Period Expenditure column. Mileage must be documented in order to receive reimbursement.

Note: Only one travel charge and mileage allowance is allowed per SFD completed unit; however, for MUD units, mileage reimbursement is limited to a single round-trip per day.

Line 113 – Total Travel Costs - Enter the sum of Lines 110 through 112.

SECTION 210 – TOTAL DIRECT PROGRAM ACTIVITIES

Line 114 – Total Direct Program Activities - Enter the sum of Total Direct Activities (Section 160 through Section 200) - Lines 11, 35, 44, 57, 64, 71, 104, 109, and 113. Enter this number in Section 30, Line 6 on page 1.